



PY381 Creating, Updating, and Stopping General Deductions

Creating, Updating, and Stopping General Deductions

General Deductions are non-benefit deductions, such as charity, garnishments, union dues, and parking. General Deductions can be both pre-tax and post-tax based on setup from the General Deductions or Garnishment tables in Cardinal. Deductions are set up at the Company (Agency) level for employees to be eligible.

Note: Cardinal does not prorate deductions. Therefore, the entire amount is deducted if a deduction starts or ends in the middle of the pay period.

This Job Aid outlines the processes for creating, updating, and stopping a General Deduction in Cardinal.

Table of Contents

Creating A New General Deduction	2
Updating a General Deduction	6
Manually Stopping a General Deduction	9



PY381 Creating, Updating, and Stopping General Deductions

Creating A New General Deduction

1. Navigate to the **Create General Deduction** page using the following path:

Navigator > Payroll for North America > Employee Pay Data USA > Deductions > Create General Deductions

The **Create General Deductions Search** page displays.

Create General Deductions

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

Empl ID begins with

Company begins with [Q](#)

Name begins with

Last Name begins with

Second Last Name begins with

Alternate Character Name begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

Limit the number of results to (up to 300):

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

2. Search for the applicable employee by entering the Employee ID or known portion of the Employee ID in the **Empl ID** field.

Note: You can also search by Employee Name or Last Name using the corresponding field. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

3. Click the **Search** button.



Payroll Job Aid

PY381 Creating, Updating, and Stopping General Deductions

The **Create General Deductions** page displays.

4. Enter/select the applicable Deduction Code using the **Deduction Code Look-Up** icon.
Note: For further information about Deduction Codes, see the Job Aid titled **PY381 General and Benefits Deduction Codes**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.
5. The **Effective Date** field defaults to the current system date. Update this date using the **Calendar** icon as needed.
Note: Cardinal does not pro-rate general deductions. If the effective date is within the pay period, the deduction will be deducted with the full amount. If the effective date is prior to the current pay period, the Payroll Administrator will need to do a retroactive calculation and enter the retroactive amount in SPOT. If a future dated row is entered and outside of the current payroll period, the deduction will take effect in the future pay period. For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.
6. The **Take on all Paygroups** checkbox is selected by default.
Note: If an employee has multiple jobs within the company:
 - When checked, the deduction will be taken from all jobs.
 - When unchecked, the deduction will only be taken from the primary job.



PY381 Creating, Updating, and Stopping General Deductions

7. The **Calculation Routine** field defaults to “**Default to Deduction Table**”.

The **Calculation Routine** field options used in Cardinal are as follows:

Calculation Routine Options	Description
Default to Deduction Table	Select this value to use the calculation routine that is specified on the Deduction Table
Flat Amount	Select this value to calculate the deduction as a flat amount and enter the amount in the Flat/Addl Amount field

8. Optionally, select a deduction end date using the **Deduction End Date Calendar** icon.

Note: If the effective date is within the pay period, the deduction will be deducted with the full amount. To deduct a partial amount due to mid-pay period changes, calculate the prorated amount and enter that amount in SPOT. If a future dated row is entered and outside of the current payroll period, the deduction will take effect in the future pay period. For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in Job Aids under Learning.

9. Enter the applicable deduction rate or deduction percentage in the Deduction Rate or % field if a rate or percentage-based calculation routine was selected during Step 8.
10. The **Loan Interest %** field is not being utilized in Cardinal.
11. If the “**Flat Amount**” calculation routine was selected during Step 8, enter the flat amount for the deduction in the **Flat/Addl Amount** field.
12. Optionally, enter a total goal amount for the deduction in the **Goal Amount** field.

Note: If entered, the deduction will automatically stop once the goal amount is reached (i.e. **Goal Amount = Current Goal Balance**).



Payroll Job Aid

PY381 Creating, Updating, and Stopping General Deductions

The screenshot below displays a Sample Deduction (with applicable data entered/selected).

Create General Deductions

Person ID [REDACTED]

Company DOT VA Dept of Transportation

General Deduction [Search] [1 of 1] [View All]

*Deduction Code CVC [Search] Combined Virginia Campaign [Add] [Remove]

Deduction Details [Search] [1 of 1] [View All]

*Effective Date 07/10/2020 [Calendar] ☒ Take on all Paygroups [Add] [Remove]

*Calculation Routine Flat Amount [Dropdown] ☐ Ded stopped by Self Serv User

Deduction End Date [Calendar] Deduction Rate or % [Text]

Loan Interest % [Text] Flat/Addl Amount 25.00

Goal Amount [Text] Current Goal Balance [Text]

This data was last updated by [Text] Data last updated on [Text]

Save [Return to Search] [Previous in List] [Next in List] [Notify] [Refresh] [Update/Display] [Include History] [Correct History]

13. To add an additional general deduction, click the **Add a New Row (+)** icon within the **General Deductions** section and repeat Steps 5-13.
14. Once all deductions are entered, click the **Save** button.



PY381 Creating, Updating, and Stopping General Deductions

Updating a General Deduction

1. To update a general deduction, navigate to the **Create General Deduction** page using the following path:

Navigator > Payroll for North America > Employee Pay Data USA > Deductions > Create General Deductions

The **Create General Deductions Search** page displays.

2. Search for the applicable employee by entering the Employee ID or known portion of the Employee ID in the **Empl ID** field.

Note: You can also search by Employee Name or Last Name using the corresponding field. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

3. Click the **Search** button.



Payroll Job Aid

PY381 Creating, Updating, and Stopping General Deductions

The **Create General Deductions** page displays.

4. In this example, the employee only has one deduction (Row 1 of 1). If the employee has multiple deductions defined, navigate to the applicable deduction using the navigational arrows or **View All** link within the **General Deductions** section.
5. Once the correct deduction is displayed, click the **Add a New Row** icon (+) within the **Deduction Details** section. The data from the previous row automatically transfers to the new row.



Payroll Job Aid

PY381 Creating, Updating, and Stopping General Deductions

A new effective dated row displays for the deduction.

Create General Deductions

Company DOT VA Dept of Transportation

General Deduction

*Deduction Code AGYMSC Agency Miscellaneous

Deduction Details

*Effective Date 02/11/2021

*Calculation Routine Flat Amount

Deduction End Date

Loan Interest %

Goal Amount

Take on all Paygroups

Ded stopped by Self Serv User

Deduction Rate or %

Flat/Addl Amount \$25.00

Current Goal Balance

This data was last updated by Online User

Data last updated on 02/11/2021

Save Return to Search Notify Refresh Update/Display Include History

6. **The Effective Date** field defaults to the current system date. Update this date using the **Calendar** icon as needed.

Note: If the effective date is within the pay period, the deduction will be deducted with the full amount. If a partial amount is required due to mid-pay period changes, do a calculation of the prorated amount and enter that amount in SPOT. If a future dated row is entered and outside of the current payroll period, the deduction update will take effect in the future pay period. For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in Job Aids under Learning.

7. Review and update the applicable information in the corresponding field(s). Refer to the **Creating a New General Deduction** section within this Job Aid for specific data entry guidance.
8. To enter an additional effective dated row for the same deduction, click the **Add a New Row** icon (+) within the **Deduction Details** section and repeat Steps 6-9.
9. Once all updates are completed, click the **Save** button.



PY381 Creating, Updating, and Stopping General Deductions

Manually Stopping a General Deduction

1. To update a general deduction, navigate to the Create General Deduction page using the following path:

Navigator > Payroll for North America > Employee Pay Data USA > Deductions > Create General Deductions

The **Create General Deductions Search** page displays.

2. Search for the applicable employee by entering the Employee ID or known portion of the Employee ID in the **Empl ID** field.

Note: You can also search by Employee Name or Last Name using the corresponding field. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

3. Click the **Search** button.



Payroll Job Aid

PY381 Creating, Updating, and Stopping General Deductions

The **Create General Deductions** page displays.

Create General Deductions

Person ID [REDACTED]

Company DOT VA Dept of Transportation

General Deduction [Search] | 1 of 1 | View All

*Deduction Code CVC [Search] Combined Virginia Campaign + -

Deduction Details [Search] | 1 of 1 | View All

*Effective Date 07/10/2020 [Calendar] ☒ Take on all Paygroups + -

*Calculation Routine Flat Amount [Dropdown] ☐ Ded stopped by Self Serv User

Deduction End Date [Calendar] Deduction Rate or % [Text]

Loan Interest % [Text] Flat/Addl Amount 25.00

Goal Amount [Text] Current Goal Balance [Text]

This data was last updated by [Text] Data last updated on [Text]

Save Return to Search Previous in List Next in List Notify Refresh Update/Display Include History Correct History

- In this example, the employee only has one deduction (Row 1 of 1). If the employee has multiple deductions defined, navigate to the applicable deduction using the navigational arrows or **View All** link within the **General Deductions** section.
- Once the correct deduction is displayed, click the **Add a New Row** icon (+) within the **Deduction Details** section.



Payroll Job Aid

PY381 Creating, Updating, and Stopping General Deductions

A new effective dated row displays for the deduction (Row 1 of 2 in this example).

Create General Deductions

Person ID [REDACTED]

Company DOT VA Dept of Transportation

General Deduction 1 of 1 View All

*Deduction Code CVC Combined Virginia Campaign

Deduction Details 1 of 2 View All

*Effective Date 07/11/2020

*Calculation Routine Flat Amount

Deduction End Date

Loan Interest %

Goal Amount

☒ Take on all Paygroups

☐ Ded stopped by Self Serv User

Deduction Rate or %

Flat/Addl Amount \$25.00

Current Goal Balance

This data was last updated by Online User Data last updated on 07/10/2020

Save Return to Search Previous in List Next in List Notify Refresh Update/Display Include History Correct History

- The **Effective Date** field defaults to the current system date. Update this date using the Calendar icon as needed.

Note: If the effective date is within the pay period, the deduction will be deducted with the full amount. If a partial amount is required due to mid-pay period changes, do a calculation of the prorated amount and enter that amount in SPOT. If a future dated row is entered and outside of the current payroll period, the deduction will stop in the future pay period. For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

- Enter/select the applicable date for the deduction to stop in the **Deduction End Date** field.

Note: This date must be later than the effective date used to start the deduction.

- Click the **Save** button.